



MasterMinding Your Business

Executive Summary

Feb.24.09

How might I better **manage office administration**?

block your time | time for admin daily, ie. one hour | don't answer phone, only at set time | contact an agency that has virtual assistants | schedule in time every day or week | 'hire' someone part-time or contract | colour-coding, 'hot' files | purge paper files, spring fling | paper vs. computerized | hire virtual assistant to take the calls beginning with a 'per call' payment schedule | have a 2nd pair of eyes watch how you work, suggest what you can reduce or offload | hire someone (student) to file, etc. 1-2 times/week.

How might my (interior design) **service seem less intimidating** or daunting to prospects?

show sample pricing, pricing packages | ensure clients know end result is not your (designer's) personal style | look at how your biz appears to potential clients, ie. Web site appealing more to well-to-do audiences? | get permission to show homes of former clients | write article showing one room is possible | examples of smaller chunks | offer DIY (do-it-yourself) plan/guide as a service | virtual/online tours like real estate, after work complete | flat rate prices | piggy-back with home cleaning person/company | offer to do work while client is away (holiday, work) – other biz does this, washing/detailing car while owner's parked at job.

How might I **support micro business**?

share meetings on-site, maybe | have guest speakers ie. on Web design, public speaking, etc. | low cost initial set-up for marketing ideas, thereby getting a foot in the door of all micro biz | (advise them) #7 rule, 7 times networking before people know what you do | (advise them) show examples of your past biz | keep having networking gatherings | meet on a regular basis | gauging climate of concern of participants.

How might I **use my core competency** (promotional writing) to get more clients?

brochures | media releases | events | find clients with pent-up news (= need) | talk with people who'd be helping your clients (clients' suppliers) to give you a heads-up | promote yourself to new businesses | get contract work at larger companies | Web site? | pick few new, small businesses, ask to do a newsletter at introductory reduced rate, they'll love your work, a service they'll need to get off ground | work overseas.

How might I persuade clients there's **value in using an agent versus DIY** do-it-yourself (for travel)?

wording to appeal to frugal customer | appeal to higher income client | remind cost of not using one, risk | they'll save time | client doesn't need to be tech/Web savvy for booking | your insight can offer other destinations | aware of last-minute snags | in real needs, ie. death in family | educate (blog?) DIY is fine while no problems, but when things go wrong, need expert help (agent) | find a niche market, ie. students travel for gap year, philanthropy clients travel to help, women only, adventure travel for couples | contact funeral homes or nursing homes to give talk about reduced travel fare in family emergency/death (post-session spinoff: advance planning, house sale after death, travel to heal after a death) | market as travel 'specialist'.

How might I recover from an **over-demanding client**?

contract so they know what to expect (post-session: rec'd. participant's contract as sample) | improve verbal comm'n | let them know with each call they slow things down | answer/return call 2x/day, less interruption | time is \$\$, pay per hr. | respect red flags, listen to gut before | "How can we make this happen to move to resolution?" | specific contract, 4 free calls, rest at a cost | may have to politely say they may need someone else's services | "If I do this (XYZ), would that satisfy you?" (some don't want to be happy). ❖



MasterMinding Your Business

March.24.09 # Executive Summary

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How might I ...

identify people and positions to contact for my entry into a system or organization?

contact sponsors of charity events, recognizing their contributions, pitch to their organization's needs / join peer group, learn from them / create a newsletter, build newsltr. base / ask friend who works for target firm / put yourself in situations where there are lots of people – ask / join association that'll target specific people you're seeking / Chamber of Commerce events may help networking / contact HR dept. to ask who handles staff training, call that lead for appointment / select 10 firms, call each asking "Who's responsible for systems entry?" when you speak to that lead, first ask "are you the person to speak to regarding team coaching, or would you recommend that I speak to another designate?" (to get the person with authority to hire you) / above notes good, takes time to build biz / set goals for year, week, each day / get together with colleagues working in same area to share ideas / in biz, might be someone in HR, or they may be able to direct you / look at who you've been contacting, get outside box ie. contact rehabilitation businesses, staffing agencies, search newspaper or phone book or Web to see what type of biz you've never called, prepare for new exciting contacts, what can you give them that's different or value-added?

narrow my niche, as I love many areas and am always asked what my niche is?

sit quietly with pen to write down past, present, and possible-future areas of speciality then, as you read each, feel it and start the weeding out elimination / check the book 'Book Yourself Solid', Michael Port talks about ways to I.D. ideal client and how to define niche, also a workbook to download from his site / leave the 'menu' of what you do to your Web site and printed material, use (and practice) sound bites in conversation, ask friends/contacts to be sounding board to help distill those bits / lots of info at www.freelanceswitch.com / put different fields on slips of paper, draw one at a time, use immediate reaction to determine like/dislike / check peers' Web sites, see what you love / make a goal or a game to write one different kind of promo piece each month / be a jack/jane-of-all-trades / decide what you don't like / "I'm an XYZ (communication) expert who helps businesses to [fill-in-blank], and/or I help individuals to [xyz]" / depending on where you're marketing your services will make difference what your niche is / as times change, so may your niche (ie. now, so many newly looking for jobs and re-entering workforce) / what's your first love in terms of topics? ie. If you thrive on technical matters, you may wish to focus on writing technical manuals / make choices you love and sell from that, you really need only focus on 2-3.

attract buyers in the \$200,000 - \$300,000 range (real estate)?

trade shows, going where target congregates, women's groups / contact previous buyers/sellers to see if there are changes in their lives, there may not but may have kids/friends/relatives to refer you to / team up with commercial realtor to cross-refer / use "specialized research service" at www.cbsc.org and local library to help identify target then try to follow their habits and be there – it's simplistic yet powerful / adapt strategies of > \$500,000 to yourself / get outside comfort zone / spend few days with nothing to do with realty – paint, write, draw etc. and see what pops up / try the artist's way / create a vision board of homes and people in the homes / up-sell to your clients, rather than sell them smaller, where will they be in 5-10 years, will they need to buy bigger/smaller? what's future of your clients? kids, school, jobs, location all play big role in selling bigger more expensive homes / offer reward to past clients, I worked with agent who sent me gift when I bought through her, another gift when I sold through her, and referral gift when I sent her new biz, so she's #1 in my mind when I think of realtors.

secure qualified referrals from current (insurance) clients?

ask current clients to describe how you helped them (like testimonial) and then ask who else they know who may benefit from same, ask them to be part of your marketing efforts / revisit your results with given client and ask them for names of who could use same improvement/benefit / ask other peers you admire how they get good referrals / check success-oriented Web sites and mags ie. Success, Motto(defunct?) for tips / reward current clients with referral gifts (cards, wine, chocs, etc.), qualified referrals don't have to be difficult, have your client get their potential referral to call you, they will if sincerely interested / referrals are easy, it's the qualified criteria that's hard, ask existing clients for referrals of insurable friends, may not be easy to sell someone policy if they have serious health issues / drip, drip, drip – it's not who they know, it's who they think of – all above ideas work / be in groups that you get results from, give and you'll get / ask them if they know anyone who could use your services / sending current clients a periodic newsletter will help keep you in their thoughts, especially if they know of someone who's looking for similar services

afterthoughts: busy putting out fires, create space to focus/release, get out of house, involved/group

develop talking points to sell creativity workshops to business?

pros/cons, why your workshops may work for each business, how you can turn a negative into a positive with staff / develop questionnaire re: challenges businesses face with employee motivation/ interaction, then show how program may help them work through each issue / tag team, find someone already speaking or coaching to biz, offer to add a 15-20 minute 'creative break' to their seminar/workshop / have written info on your biz and results from it, testimonials, discover when firms decide on education for year to be sure if they're looking now or future – send info, follow up / look from firm's point-of-view, what might you (as owner/president of that firm) seek to learn/gain from this workshop?, what are things that would help your staff increase biz or performance? / think outside box, other than businesses, who may be a client or provide a circle of influence (ie. other peers, staffing agencies, coaches), seek referrals that are not typical / look for ways to be part of staff meetings, off-sites, retreats, or lunch-n-learns, because if you can demonstrate on a small level how you can benefit the firm, they'll know what you're selling and can make more informed decision / send demo tape or a link to part of a pre-recorded video of such a session posted on your Web site, backed up with testimonials, maybe a one-to-three month 'retrospective' from participants.

use my testimonials (short form: kudos) and results from clients in my networking conversations?

put some on different biz cards with your Web site / listen with just the idea to listen, they'll say something that will allow you to connect to a kudos / look for patterns in your kudos, qualities you embody, put those on / refer back to an individual who may have a common interest with the party you're speaking to / add to Web site, create its own page / watch for cues from networking contacts for an opportunity to make a connection between an expressed concern and your kudos / on every e-mail, below your signature, put a testimonial, changing it weekly (organize e-mail folder of kudos to recycle if needed at later date), give it a catch-name ie. 'High Five', or 'I Love You Man' / in conversations, I'd say I have testimonials perhaps, depending on where education is for this person, send later, do they need your help? / prepare a little bookmark with your biz contact info and 1-2 best kudos on it to present at events, could also be conversation starter / include kudos in all forms of contact (verbal, Web site, face-to-face presentations), those kudos become part of 'your story' rather than 'just kudos', more powerful life of their own if incorporated into stories you share, people love stories and to relate, connect, and feel part of the story, too / have your client write the testimonial as a story, what they needed (problem), how you helped (solution), how you exceed expectation (value added), people like to read/hear short stories and the bonus is it's all about how you helped.

sell more effectively to reluctant buyers (advertisers)?

determine source of reluctance, is it lack of funds or a failure to see value, if latter, testimonials may help / keep record of how your biz helped other buyers, and leave kudos and/or stats with them after your visit / sell the benefit always, is it a product that will benefit from your services / stats convince, if you can show them how others have been helped by yours or similar services / ask questions, listen, ask questions, listen, ask questions, listen, go back to the office and revisit to understand more fully to help overcome objection / spend time I.D.ing target market, I.D. problem or issue they have and tell them how you solve that, make it more about what they need vs. what you do / role-play to practice handling objections, write them down with 2-3 responses to each so you can deliver smoothly and confidently / create mock-ups of ad copy and e-mail with rates and back-up stats on effectiveness / can you rate a '3-for' / people need to know (a) that people read and (b) that they act on it, so if you can demo this, advertiser will be more willing because if they haven't advertised before, they want a kind of security.

conquer stage fright in making first contact? [context: to gently point out error/ flaw and why they need me]

the best actors/athletes have stage fright, prep your lines, practice, practice, practice, take a deep breath just before curtain goes up / have actual forms made up to use that tactfully address the problems/needs we prospects may have, then list your skills to solve those – find contact person to be sure you reach decider / I also share your stage fright – we have to push ourselves to make contacts, I find writing easier than phone because I can edit, so that's a benefit of writing to contacts / write yourself a script or template, tell what you're going to do, to commit outside yourself, just do it! It gets easier, role-play with trusted friend, breathe, breathe, breathe, just do it! / learn to recognize the voice of your gremlin/saboteur and be sure you send her/him for coffee before 'acting', work in a coach, remember you're doing them a favour by making them look better / call a friend/mentor before making your calls, agrees to a call after sending 5-8 letters/messages, this will help push you over hump and you won't sit in one spot moving commas around avoiding the necessary / work with me (creativity expert) / don't think about the fear, just do it / write letter about a good example (of your particular skill when you see it exhibited elsewhere), and send it / check out a friend's, try a friendly note / get on peers' networking blogs, Web sites (in this case, virtual assistants at askyourva.com) / ask someone to call you, be accountable to someone/buddy / list all the things that could possibly happen if you did send the letter / write down what would be the worst possible outcome, ask yourself if you can live with it / conquer stage fright by practicing with anyone, sometimes letting the person know you're nervous breaks the ice a bit – I had no idea (you suffered this), so believe in yourself!

target for my skills in organizing, refreshing, and restyling home interiors and exteriors?

join groups where you can get contacts, you need the children to help the senior get organizing to purge – have some info on prices, etc. / team up with realtors to expand client base / share a booth or have your own at home shows / join women's groups / contact other pro organizers whose speciality differs to refer each other [note: homepreneurs know and appreciate this as 'co-opetition'], join pro organizers' group, hire a marketing expert / join networking/referral group like BNI, often realtors and mortgage brokers here are good complimentary biz for you / stress to people with slow sales how you can improve their market difference or improve their bottom line – if you can afford to, maybe do house sale on contingency / try home parties, host gets room or project done, she brings in X number of prospects / start newsletter or blog, give away 3 ideas to do now / re-brand yourself, recycle, re-use / open house / market services with advertising, who needs your services? older people, working parents with kids and no time – maybe move away from one part of your biz into another, organizing's big right now and people just don't have time to do it, keep it affordable / contact CARP (Canadian Association of Retired Persons), lots of seniors need help in this area, when children see benefit to their parents, you'll gain more clients.





Getting to the Client's Real Need

characteristics of an ideal collaboration – what it looks/feels like – when you're crystal clear about a client's needs?

honest, open, trust, integrity, quality services, feel fulfilled, your strengths/skills have been correctly identified, realize it may take unexpected turn and are prepared to shift, how far client will go with you to get result, how much client's willing to invest (both money and effort), shared ownership in solutions, personal rapport, good emotional read, know 'why' behind the want, goals, where they've come from, triage (like in emergency room) to prioritize needs, consider need may be distinct from want (see **afterglow** below).

best practices, realizations, and techniques you've had success with in identifying client's real need?

open with 'how's your day going?' to flag barriers, recognize many have lost desire to dream (so encourage its return), build on the positive, 1-2 early questions you know they can answer to build confidence to go deeper, present optimum or ideal plan to gauge where client is now, if client's too stuck to state desired outcome or positive result you can ask 'what's worst nightmare?' then reverse/re-frame answer to find possible approach, ask 'is there anything else?' at end of interview (client often divulges unrelated yet significant info), better to design overly comprehensive questionnaire as it may trigger client's realization of need, prompt their questions if they're stuck on what to ask i.e. 'maybe you're wondering if XYZ approach would help', prep by knowing a bit about their career/field both to show interest and also to know industry trends or where it may hurt.

next practices or ideas that could work even more powerfully when zeroing in on the client's real need?

ask 'is anything in the way?' (externalizes issue, anything is less personal, non-threat), suggest one option to clarify if need is accurately pinpointed ('we can try XYZ; might that be helpful?'), celebrate successes to keep hope alive, share quick 'I've been there' or 'I've handled something similar' anecdote to relate so client feels safe to confide need, assure confidentiality, send client pre-meeting note of general discussion points for prep, document (post interview) both sides' expectations and to do's, consider critical path time lines for needs, ask for referral if their need/project is the kind you'd like more of, thanks (hand-written ideal) for meeting or lead.

afterglow a few closing afterthoughts ...

In [The Client Trilogy](#), advertising consultant Mike Carlton characterizes needs as outcomes or quantitative goals rather than task-driven, while wants are typically tangible things (a new Web site, a brochure, a slogan).

For dialogue that drills down to need, consider **If the client doesn't want it then you don't need it bad enough.** Article author Alan Weiss suggests the difference between want and need is the value distance, and that one single word – why – can help clarify. Client: 'we want XYZ.' You/Expert: 'why do you say you want that?'

Of note, Weiss is but one of many experts featured in the rich resources in [Management Consulting News](#) archives, whose abundant articles and newsletters are categorized chronologically, by author, and topic theme.